Matter Management Software Compared

Idea In Short

Choose matter management software by the work your legal team actually does. Corporate legal departments that manage many entities, board documents and large contract portfolios should shortlist an integrated platform such as DiliTrust. Departments focused on outside counsel spending should compare SimpleLegal and LawVu. Small firms that need billing, trust accounting and client communication should compare Clio Manage, PracticePanther and MyCase. Test each vendor against six criteria: matter management capabilities, artificial intelligence [AI] assistance, security and compliance, integrations, reporting and deployment support. Verify certifications and their scope, plan the migration of historical records and set measurable performance indicators before you sign, because vendor descriptions are claims, not audited results.

Legal work has outgrown spreadsheets. One matter can involve several jurisdictions, outside counsel, billing systems and compliance checks. The team in charge needs one view of progress, spending and risk. For law firms and in-house legal departments alike, matter management software now sits at the center of daily work. This article compares six platforms that corporate legal buyers and law firm administrators often consider. The details come from each vendor's own public pages, so treat them as claims to test in a trial.

Selection criteria

Each product is judged on six criteria that describe how a platform behaves in daily use:

1. Matter management capabilities: intake, assignment, document management, deadlines, outside counsel coordination and spending oversight
2. Artificial intelligence [AI] assistance: document analysis, summaries and drafting support inside matter records
3. Security and compliance: recognized certifications, hosting options and data residency

4. Integrations: fit with document management, finance, customer relationship management [CRM] and productivity systems
5. Reporting and analytics: dashboards that help general counsel and managing partners decide
6. Deployment and support: onboarding needs, setup effort and support for teams of 50 to 200 users

Teams weigh these criteria differently. A department with heavy outside counsel costs wants reports and spend controls. A small firm wants billing and a quick start. The order below follows the original comparison and is not an independent ranking. Write down your own weights before the demos begin, so vendor presentations do not set the agenda.

DiliTrust

DiliTrust calls itself an AI-powered legal and governance platform. Its Matter Management module serves corporate legal departments and the law firms that work with them. The comparison lists it first because it links matters to a wider governance suite. It does not treat each case as a separate record. That helps general counsel at multinational firms and the outside lawyers who back them up. DiliTrust's comprehensive matter management software for law firms puts related legal information in one place, which cuts reliance on disconnected systems.

The module page describes Quick View, an AI snapshot of each matter, plus an activity feed, prebuilt matter templates and a statistics dashboard. Its built-in AI engine, Lini, produces summaries, reports and matter insights. DiliTrust says Lini runs on its own infrastructure, so matter data does not go to outside AI providers. The vendor also says its solution is ISO 27001 and System and Organization Controls [SOC] 2 Type II certified, with sovereign hosting options and 24/7 multilingual support. The American Institute of Certified Public Accountants [AICPA] describes SOC 2 reports as covering controls at a service organization that relate to security, availability, processing integrity, confidentiality or privacy.1 The vendor adds onboarding, training and a dedicated account manager.

Best for: corporate legal departments and law firms that handle multijurisdictional matters tied closely to governance and compliance.

Standout capabilities:

- AI matter snapshots, summaries and reports through Lini
- Prebuilt matter templates and a workload statistics dashboard
- ISO 27001 and SOC 2 Type II certifications, as stated by the vendor
- 24/7 multilingual support, onboarding and training

Limitation: the module page describes no trust accounting or litigation billing workflows, so specialized practice tools may suit some solo lawyers and smaller litigation firms better.

Clio Manage

Clio is a cloud-based practice management platform. Its public pages name users from solo lawyers to large legal teams. It joins matter records with time tracking, billing, document management and trust accounting, so it covers much of a firm's daily work. Its main strength is linking the office side and the legal side. Firms can handle intake, calendars, documents, invoices and payments without jumping between apps. Clio says it captures hours automatically and turns them into invoices. It also says it accepts online and in-person payments. The platform connects with more than 300 tools and offers an application programming interface [API], so firms can add features that fit their needs.

Trust accounting needs close attention at any firm that holds client money. The American Bar Association [ABA] Model Rule 1.15 requires lawyers to keep client funds apart from their own property. It also requires complete records of trust funds, preserved for a set period after the work ends.2 Software can help keep those records. The lawyer stays responsible for compliance.

Best for: law firms that want one central platform for practice management.

Standout capabilities:

- Time tracking, billing and trust accounting in one system
- More than 300 integrations and an API
- Client intake tools and online payments

Limitation: its core focus is law firm operations, not company-wide governance and entity management.

LawVu

LawVu is a legal workspace built for in-house legal departments. It combines matter management, contract management and legal spend oversight. Teams use it to sort requests from the business, keep matter records and coordinate outside counsel. The product puts special weight on intake and task management. Its page describes capturing and routing legal requests from every channel, with AI-assisted triage and self-service options for the business. Legal operations leaders can see where requests start, assign tasks and follow progress across the department.

The Corporate Legal Operations Consortium [CLOC] describes legal operations as an integrated, strategic business partner to the legal team and the wider organization, which explains why intake, workload and spend data matter to these buyers.3 LawVu's reports focus on metrics that corporate legal teams use, such as workload spread, outside counsel costs, invoices, budgets and vendor performance.

Best for: mid-sized corporate legal departments that want a common process for legal intake, matter tracking and spend oversight.

Standout capabilities:

- A central intake portal with AI-assisted triage for business requests
- Outside counsel management and legal spend visibility
- Matter records linked to contract lifecycle management

Limitation: dedicated entity management and board governance are not central to the offer.

SimpleLegal

SimpleLegal is part of Onit. It provides matter management and e-billing software for corporate legal departments. Its page calls the product a system of record for matter management, with task templates and configurable intake workflows. The product stresses outside counsel spend, financial reporting and vendor management, so it suits groups that want tighter control over outside legal costs. General counsel and legal operations teams use it to review invoices, apply rules-based approvals and enforce billing rules. The page also lists control over invoices, budgets and accruals, along with tools to collect feedback

on vendors and compare firms. Matter records link to financial data, so a department can see how legal spend relates to each matter and to wider business goals.

Best for: corporate legal departments that put outside counsel spend control and financial reporting first.

Standout capabilities:

- E-billing workflows with rules-based invoice approvals
- Budget and accrual control with spend analytics
- Vendor feedback collection and firm benchmarking

Limitation: its main edge is financial oversight, not advanced AI drafting or broader corporate governance.

PracticePanther

PracticePanther is a legal practice management platform. Its pages list solo practices, small and medium firms, and large firms as users. It covers matter management, contact records, document storage, billing and payments through an easy interface. The product stresses a simple setup and less admin work, which can appeal to firms with no dedicated technology staff. Workflow automation handles recurring tasks. The page describes automated client intake forms and reminders for appointments, document requests and invoices. It also lists built-in trust and operating accounting, with payments by credit card, ACH and eCheck. The vendor publishes figures on time saved and faster payment, and buyers should treat those as marketing claims until a trial confirms them.

Best for: solo lawyers and small firms that want simple practice management software.

Standout capabilities:

- A simple setup and onboarding process
- Workflow automation for recurring admin tasks
- Billing, trust accounting and payments in one place

Limitation: its reporting and governance tools suit complex multinational legal work less well.

MyCase

MyCase is a cloud-based practice management platform for law firms, including solo lawyers and small firms. It joins case management, client messages, document storage and billing in a web tool with a mobile app. Client teamwork is central to the offer. Firms that work directly with individual clients gain from its 24/7 secure client portal, unlimited texting from a dedicated number and easy access to matter records. Lawyers can review case details, send messages, create invoices from tracked time and take payments without a separate system for each task. The page also describes online payments through 8am LawPay, with payment plans and scheduled or recurring charges.

Best for: small law firms that put client communication and mobile access first.

Standout capabilities:

- A secure client portal with messaging
- Mobile access to case details and documents
- Billing and online payments in one system

Limitation: enterprise governance and multijurisdictional reporting are outside its main focus.

How to choose the right matter management software

A legal department that manages more than 50 entities, board papers and a large contract portfolio may find an integrated platform such as DiliTrust helpful. It can gather the information in one place and support steady reporting. When outside counsel spend is the main worry, SimpleLegal and LawVu focus on spend oversight and matter management. Smaller firms that need billing, trust accounting and client communication tools will find Clio Manage, PracticePanther and MyCase closer to their daily work. Organizations with strict security needs should test vendors against the ISO 27001 standard and check the exact scope of each certification. ISO describes ISO/IEC 27001 as an international standard for managing information security and notes that certification is optional. A vendor claim should therefore name the certifier, the systems covered and the date. The final choice should also weigh setup needs, integrations and total cost.

Final considerations for legal teams

Beyond features and price, legal teams should ask how the software will perform as their organizations change. Data migration needs particular attention, especially when old matter records have inconsistent names, incomplete metadata or duplicate documents. Long-term success also depends on user adoption and the ability to adapt as needs change. Departments should set measurable performance indicators, define steps for keeping data clean and review system use after launch. Regular checks of user feedback, admin workload and process efficiency keep the software useful as workloads and organizational structures shift.

- 1System and Organization Controls: SOC suite of services | AICPA & CIMA
- 2Rule 1.15: Safekeeping property
- 3What is Legal Ops | CLOC

Summary

Legal work has outgrown spreadsheets, and the right platform depends on the team using it. An integrated platform suits multinational departments that tie matters to governance, spending-focused tools suit departments that want control over outside counsel costs, and practice management systems suit smaller firms that bill clients and hold trust funds. Beyond features and price, the choice rests on security scope, integrations, implementation effort and total cost of ownership. Data migration deserves early attention because inconsistent names, incomplete metadata and duplicate documents carry over into the new system. After launch, review user feedback, administrative workload and data quality on a regular schedule so the software keeps pace as workloads and organizations change.